



# **2019 Revaluation Update**

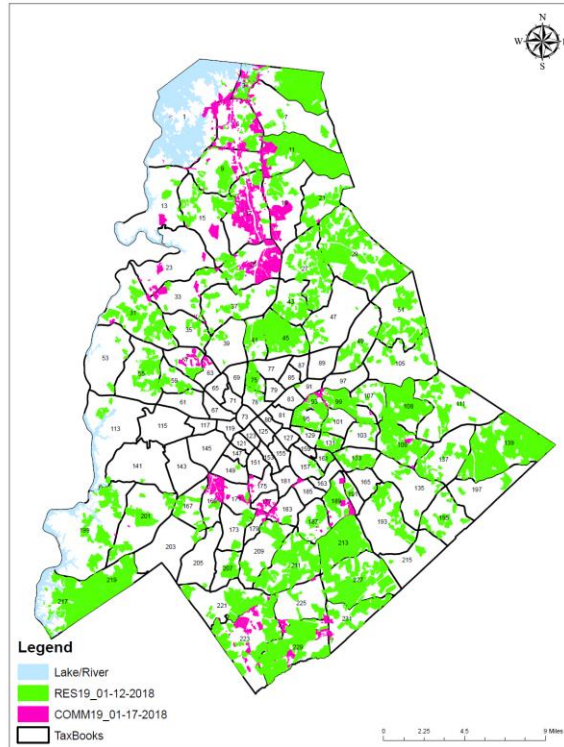
Presented to the Mecklenburg  
Board of County Commissioners  
January 25, 2018

# Progress to Date

- 175,075 Parcels Completed
- 808 Neighborhoods Completed (50.09%)
  - All neighborhoods will be completed by Mid October 2018
- 35.6% Total Increase
- 29% Residential Average Increase
- 74% Commercial Average Increase



# Progress to Date



# Progress to Date

- Upcoming 2019 Reval- Residential to date
  - Avg. Med. Sales \$264,830
  - Avg. Med Ratio .998
    - The median ratio is the middle ratio when the ratios are arrayed in order of magnitude
  - Avg. COD 5.004
    - Coefficient of Dispersion is the most generally useful measure of variability of uniformity is the COD. The COD measures the average percentage deviation of the ratios from the median ratio
  - Avg. PRD 1
    - Price-related differential is the mean divided by the weighted mean. PRD's above 1.03 tend to indicate assessment regressively; PRD's below 0.98 tend to indicate assessment progressivity



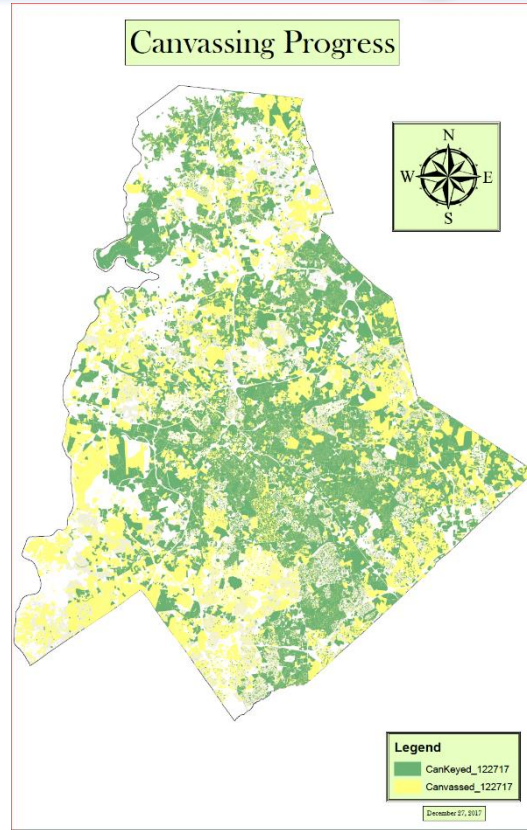
# Field Canvassing Update



- 268,137 parcels canvassed to date
- Roughly 75% of Mecklenburg has been visited
- Major Neighborhoods completed
  - 340 neighborhoods were identified as Major out of 1,608 total
  - 103,238 parcels were Major
- 138,930 canvas parcels keyed
  - 51% complete



# Field Canvassing Update



# Sales/Market Transactions

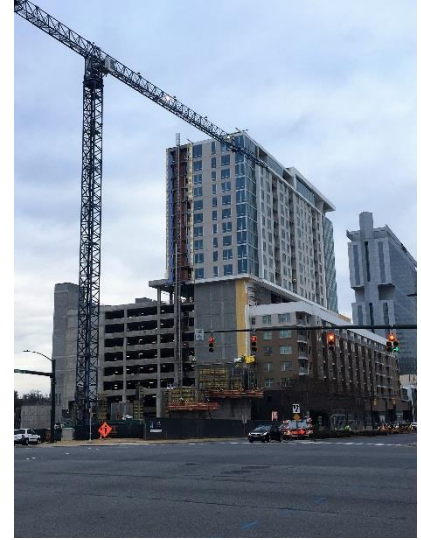
- 2011 Revaluation Qualified Sales
  - 15,656 in 2008
  - 9,898 in 2009
  - 8,140 in 2010
    - Median Sales Price was \$193,000
- 2019 Revaluation Qualified Sales
  - 24,092 in 2016
  - 22,226 in 2017\*
    - To date, Median Sales Price \$263,000
    - Increase of 36% reflected in the Median Sales Price





# Income Producing Market Study

- RFP
- Expected April 1, 2018
- To be updated for 2018-Q2, Q3 and Q4
- Assist in the valuing of the commercial market
- Single Property appraisals on a few exclusive commercial properties





# Citizen's Review Committee

- Nine member panel – appointed by the BOCC
- Ex-officio members – representative from the NC Dept of Revenue and NC School of Government
- Highly qualified group of individuals
- Copy of General Statutes
- Survey Monkey to determine best time to meet
- Dates and agendas set through April, 2018



# Citizen's Review Committee

Citizens Review Committee Meeting Agenda		January 24, 2018
		BER Room
		Time: 4pm – 6pm
Meeting called by: Ken Joyner		
Facilitator: Christy Lantis		
Attendees:		
Type of Meeting: Welcome & Overview		
Agenda Items		
Topic	Presenter	Time allotted
Welcome <ul style="list-style-type: none"><li>- Introductions</li><li>- Purpose of the Citizen's Review Committee</li><li>- Role Expectations</li><li>- Mandate of the Assessor</li></ul>	Ken & Christy	
Mecklenburg County Revaluations- Then & Now <ul style="list-style-type: none"><li>- 2011 &amp; Prior</li><li>- SL 362/159 &amp; Pearson Review</li><li>- Changes since 2011</li><li>- Additional Resources</li></ul>	Ken	
Distribution of General Statute Books & Review	Christy	
USPAP Overview & Differences between Mass & Fee	Ken	
Revaluation Process Overview <ul style="list-style-type: none"><li>- Canvassing</li><li>- Commercial Market Study</li><li>- Quality Control measures</li><li>- Neighborhood Delineation</li></ul>	Tiffany & Chris	
Going Forward <ul style="list-style-type: none"><li>- Elect Chair/Spokesperson</li><li>- Dates &amp; Times of meetings</li></ul>		



# Citizen's Review Committee

- Purpose of the Citizen's Review Committee:
- Review overall operations
- Review the revaluation process
- Review appraisal methods
- Study statistical reports as to the 2019 Revaluation
- Monitor the progress
- Report its conclusions to the Board of County Commissioners and make recommendations



# Board of Equalization & Review (BER)

- Request by BER Chair, Bruce Miller, to increase the number of terms and membership in preparation for 2019
- Majority of current BER will turn over prior to or in 2019
- Propose increasing term limitation from two terms to three terms
- Propose increasing number of members from 14 to 20
- Consistent with Mecklenburg's special legislation from 2011- Senate Bill 55

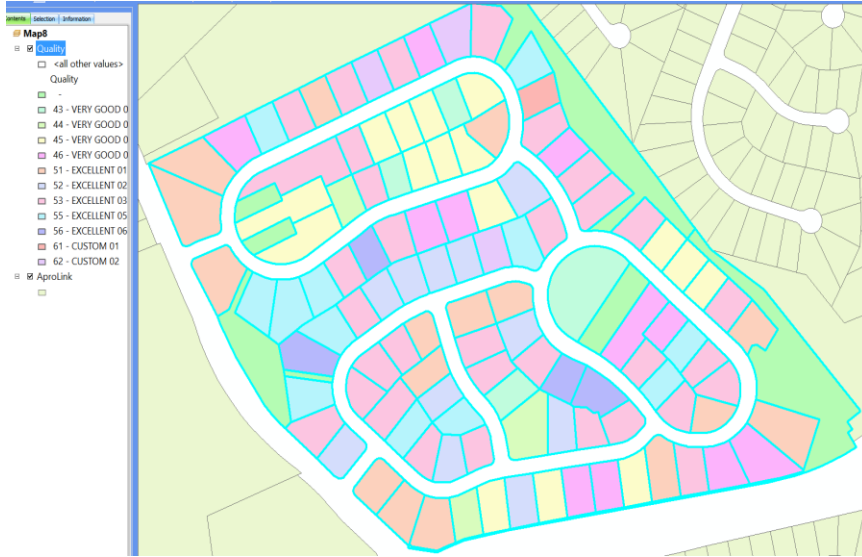


# New Grading System

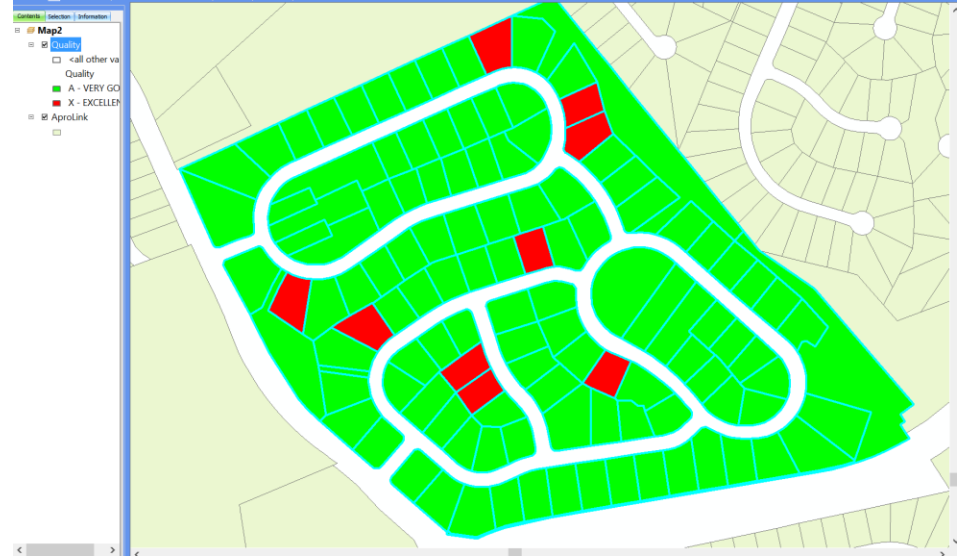
- Consistent with appraisal standards
  - Supported by market standards, IAAO standards, and Marshall & Swift Cost Estimator
- Ease of understanding for property owners
- Builds consistency between appraisers & within neighborhoods
  - Like houses in different areas graded similarly
  - Less subjectivity in grading
- Allows for adjustments based upon the construction details
- Single alpha grade will keep each neighborhood consistent and equitable in values
- Time & cost savings in mass appraisal with each revaluation



# New Grading System



**Neighborhood W942 - BEFORE**



**Neighborhood W942 - AFTER**



# Neighborhood Delineation

- Considered one of the most important tools in the revaluation process
  - Used in the majority of mass appraisal systems
  - Mecklenburg first used the NBHD system in 1972
- Divides Mecklenburg County into smaller geographic area
  - Typically, out of 1608 neighborhoods, they are 1,000 parcels or less
- Developed using natural and manmade boundaries
  - Manmade – Interstates, land use & zoning
  - Natural – lakes, creeks, & watersheds
- Analyzing market data is easier, and ensures equity
  - Determine depreciation, market variables & factors
- Maintains consistent values in a manageable market area
- Easier for the public to compare property values within a market area





# Neighborhood Delineation

Mecklenburg County - Property Record Card Property Search

Owner, Address, Parcel ID

Account: Parcel ID: 3388349 Account No: 298230


Location Address: 9727 WOODBEND CT CHARLOTTE NC

Current Owner(s): JIN LINNA

Mailing Address: 9727 WOODBEND CT

1 and 1/2 ac Over	R100
Land Use Code	SFR
Lottery/Category	-
Map Loc Code	W008
Edge Occupancy	L103 R03A-S07
Land	1 LOT
Last Sale Date	06/27/2016
Last Sale Price	\$275,000


Map or Inquiry



Valuation

Land Value	\$87,000
Building Value	\$186,000
Fixtures	\$330

Total Appraised Value: \$213,300 \*




Overview

Building (1)

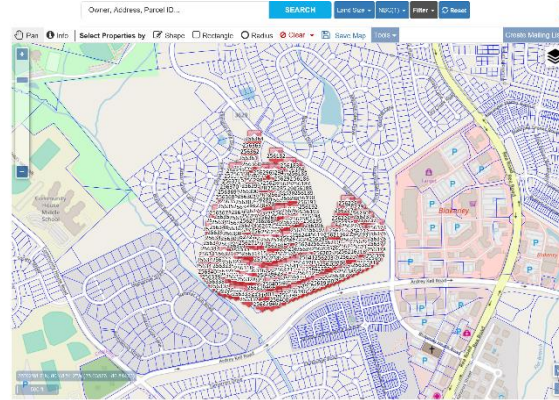
Year Built	1998
Unit Use / Style	SINGLE FAMILY RESIDENTIAL
Store	ONE AND ONE-HALF STORY
Total SqFt	2,859
Heal	FORCED AIR - DUCTED
Heat	GAS
Heated Area	2,164
Foundation	BLDG-RESIDENTIAL
Exterior Mat	ALUMINUM VINYL
Fireplaces(s)	1
Half Bath(s)	2
Gar. Unit(s)	1
Bedroom(s)	4

Map Improvements



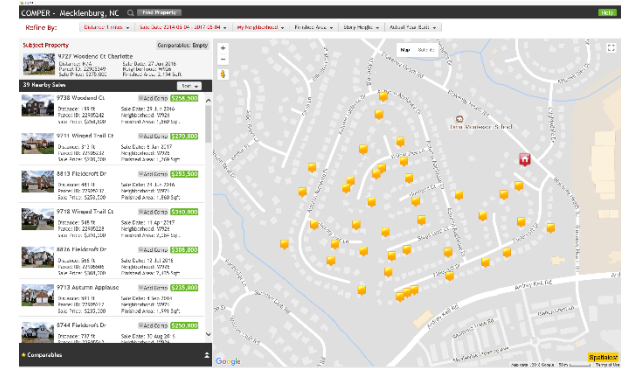
Disclaimer  
Mecklenburg County makes every effort to produce the most accurate information possible. No warranties, expressed or implied, are provided for the data herein, its use or interpretation.

Developed for Mecklenburg County - Property Record Card Property Search by



NBHD W926

NBHD W926



# Zoning Update

- Zoning is the first step in determining the legally permissible potential use of a property
- Proper zoning data allows for comparison of like properties, and proper valuation in that property classification
- CAO is working with LUESA and all jurisdictions within Mecklenburg County to verify the correct zoning is placed upon all property types



# Flood Plain Information

- Initial meeting 11/9/17 with LUESA
- Working together to educate staff on flood plains and buffers
  - Including applications available for live flood damage, swim and other buffer updates to assist in the valuation of land for the revaluation
- LUESA has also offered to train the Board of Equalization and Review, if necessary



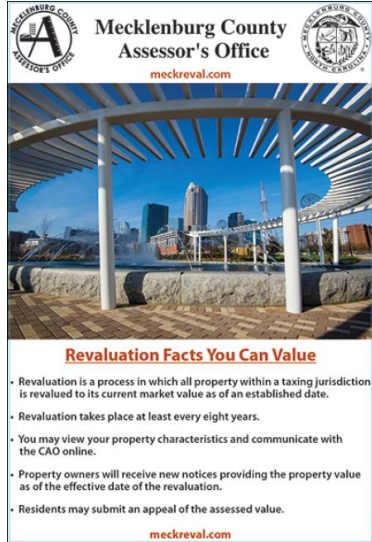
# Staff Training



- Follow-up Customer Service Report
  - Original Report for BOCC in 2013
- CSS Focus Group meetings with Ed Gagnon/CCS
- Customer Service training with Ed Gagnon/CCS
- Appraisal Summit February 20<sup>th</sup>
- Revaluation Training October 2018 (2 days)
- Modria Staff training during Summer of 2017 and on going as necessary



# Communication Plan



- Presented Revaluation information to all municipalities
- Revaluation Brochure
- Website-Branding and video messaging
- At least 100 speaking engagements in advance of 2019 Revaluation



# Communication Plan

## Past Engagements

- 1/26/17 BOCC Budget Retreat
- 6/17/17 Optimist Park Neighborhood Association
- 7/11/17 Charlotte Real Property Council Lunch Meeting
- 9/05/17 Town of Huntersville Regular Board Meeting
- 9/7/17 Charlotte Providence Rotary Club
- 9/12/17 Town of Davidson Regular Board Meeting
- 9/18/17 Town of Cornelius Regular Board Meeting
- 9/23/17 Neighborhood Leadership Awards
- 9/28/17 Board of Realtors Meeting
- 10/9/17 City of Charlotte City Council Budget Meeting
- 10/12/17 Town of Mint Hill Regular Board Meeting
- 10/19/17 Vilma Leake's Town hall for Senior Citizens
- 10/23/17 Town of Matthews Regular Board Meeting
- 10/28/17 Northend Community Coalition
- 10/30/17 City of Charlotte Meet and Eat Engagement
- 1/9/18 Town of Pineville Regular Board Meeting
- 1/24/18 Lake Norman Chamber of Commerce and LNEDC Joint
- 1/24/18 CCP South End Neighborhoods



# Communication Plan

## Upcoming Engagements

- 2/1/18 CCP Historic West End Neighborhoods Meeting
- 2/12/18 Top of the Week Uptown Rotary Meeting
- 2/14/18 CRVA Board
- 2/21/18 Bar Association Meeting
- 2/22/18 Steele Creek Annual Meeting (Table)
- 2/27/18 Charlotte Mecklenburg Housing Advisory Board
- 4/23/18 Charlotte Chamber of Commerce Board of Advisors
- 6/14/2018 Kiwanis Club of Matthews
- TBD 1<sup>st</sup> Ward
- TBD 3<sup>rd</sup> Ward
- TBD 4<sup>th</sup> Ward
- TBD Progressive Baptist Church





# Information Gathering

- 8,750 door hangers have been distributed
  - 380 or 4% have been returned
- 217 Commercial SVQ's sent
  - 87 or 40% Returned
- 6,444 Residential SVQ's sent
  - 1,915 or 20.7 % Returned
- 5,791 Cost and Income Letters sent
  - 1,704 or 29.4% Returned



# Information Gathering



Mecklenburg County  
Assessor's Office  
Real Property Division  
P.O. Box 31127  
Charlotte, NC 28231

Page 1 of 1  
**SALE VERIFICATION QUESTIONNAIRE**  
**"THIS IS NOT A BILL"**



November 21, 2017

POLLOCK KATELYN M  
20300 BETHEL CHURCH RD  
CORNELIUS, NC 28031-7108

Email Return:  
SaleVerification@MecklenburgCountyNC.gov  
Parcel ID: 00112512

Public records indicate that, on October 25, 2017, you purchased the property at 20300 BETHEL CHURCH RD in Mecklenburg County, in the amount of \$201,000.00 from HARRIS DIANE Y.

This sale verification questionnaire is designed to help the County Assessor's Office track sales and get an understanding of what is taking place in the market. The information you provide will help us in determining which sales are fair market, arms-length transactions. Sales play a vital role in determining market value and our goal is to determine what the true sale price is of each property that is sold. Please take the time to answer the questionnaire as accurately as possible.

- Was this purchased from a friend or family member? Yes ☐ No ☐
- Was a private corporation for whom you work involved in the sale? Yes ☐ No ☐
- Was anything included in the sale which you would not consider real estate? (i.e. fixtures, appliances, personal property, etc.) Yes ☐ No ☐  
If so, please list \_\_\_\_\_
- Have you completed any major repairs or remodeling to the property since your purchase? Yes ☐ No ☐  
If Yes, please explain briefly \_\_\_\_\_
- Was a trade of property involved in this sale? Yes ☐ No ☐  
If Yes, briefly describe and give estimated value of property traded. \_\_\_\_\_
- If any unpaid taxes or assessments were assumed by you, please identify them, indicate the amounts involved, and indicate whether they were included in or excluded from the sale price \_\_\_\_\_
- Was there any seller financing? Yes ☐ No ☐  
If Yes, please specify terms \_\_\_\_\_
- Was the purchase subject to an existing mortgage and, if so, in what amount? \_\_\_\_\_
- Was the sales in any way forced? (i.e. in lieu of foreclosure, an estate, by court order) Yes ☐ No ☐
- Was there an appraisal made on this property and, if so, in what amount? \_\_\_\_\_
- Is there any additional information which you feel may influence the value of this property? \_\_\_\_\_

Please use the enclosed self-addressed envelope to return this form to the County Assessor's Office, or return it by email. Also, please sign, date and provide a contact number or email address so that you may be contacted to clarify any information that you have provided. Should you have any questions please contact our Real Property Assessment Division at 704-356-6346. We appreciate your cooperation in advance.

Mecklenburg County Assessor's Office  
P.O. Box 31127  
Charlotte, NC 28231

Signature: \_\_\_\_\_  
Date: \_\_\_\_\_  
Phone/Email: \_\_\_\_\_



MeckNC.gov



<b>Total Heated Area</b>	<b>Square Footage</b>	<b>Parcel Identification Number:</b>			
Main Floor / Living Area:	1750	22312448			
Finished Upper Story:	1200	<b>Physical Property Address:</b>			
Finished Basement:	0	14712 Bellantyne Glenway			
<b>Total Unheated Area</b>	<b>Square Footage</b>	Charlotte, NC 28277			
Unfinished Basement:	0	<b>Other Area Square Footage / Additional Info:</b>			
Unfinished Upper Story:	490	Description: Garage 50042			
<b>Other Data Required</b>		<b>Main Level</b>	<b>Upper Level</b>	<b>Basement</b>	<b>Other Area</b>
Number of Bedrooms per floor:		1	3	N/A	N/A
Number of Baths / Half-Bath per floor:		1 1/2	1	N/A	N/A
Heating Type: Gas, Heat Pump, Oil, etc.:		Gas	Gas	N/A	N/A
Number of Fireplaces: Wood, Pre-Fab, etc.:		1	0	N/A	N/A
List 2 Most Dominate Floor Types: Hardwood, Tile, Carpet, etc.:		Carpet Hardwood			
Construction was 100% Complete on January 1 (Current Year) 2017					
Total Construction Cost: \$		N/A			
Total Sale / Purchase Price:		\$429,660.00			
<b>Owner / Contractor Name:</b>		Zachary & Rachelle A Currie			
Contact Phone #:		31			
<b>Appraiser Name:</b>		Self			
Appraiser Phone #:		( ) - N/A			

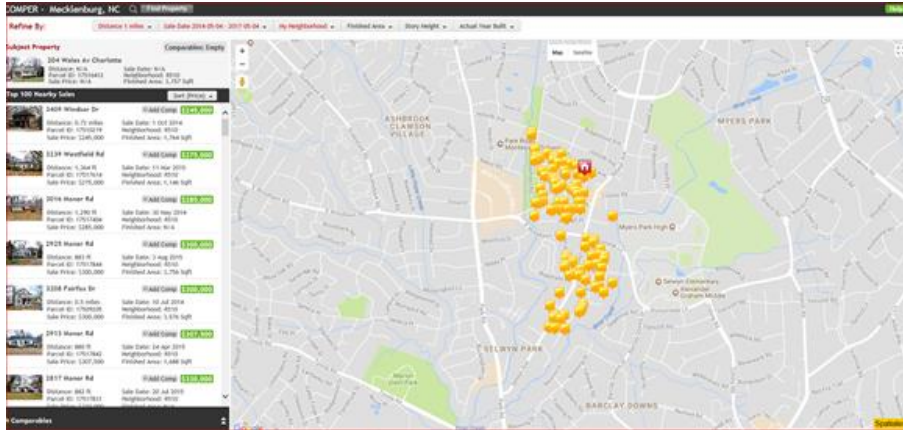
# Technology

- Modria
  - Went live August 2017
    - 119,165 page views
    - 9,937 total users
    - 548 cases filed
- Spatialest
  - Seamless information integration with Modria
  - Online Property Record Card and Comper for comparison of properties for use by citizens
- AssessPro Upgrade
- NCPTS Appeals Module
  - Increased Efficiency and quality assurance
  - Dynamic query tool
  - Enhanced integration with our CAMA system
  - Advanced docket review for the Board of Equalization and Review
  - Improvements to the appeals intake interfaces



# Technology

## Spatialest Comper



## Spatialest Property Record Card

The screenshot displays the Spatialest Property Record Card interface. The card includes sections for 'Overview', 'Building (1)', 'Valuation', and 'Disclaimer'. The 'Overview' section lists property details such as 'Your Built', 'Built Use / Style', 'Total (sqft)', 'Hect', 'Foot', 'Heated Area', 'Foundation', 'External Wall', 'Frequency', 'Full Bath(s)', 'Half Bath(s)', and 'Bedroom(s)'. The 'Valuation' section shows 'Total Appraised Value' as \$278,600.

- Spatialest is embedded in Modria
  - Comper
  - Property Record Card



# Technology

## iLookabout

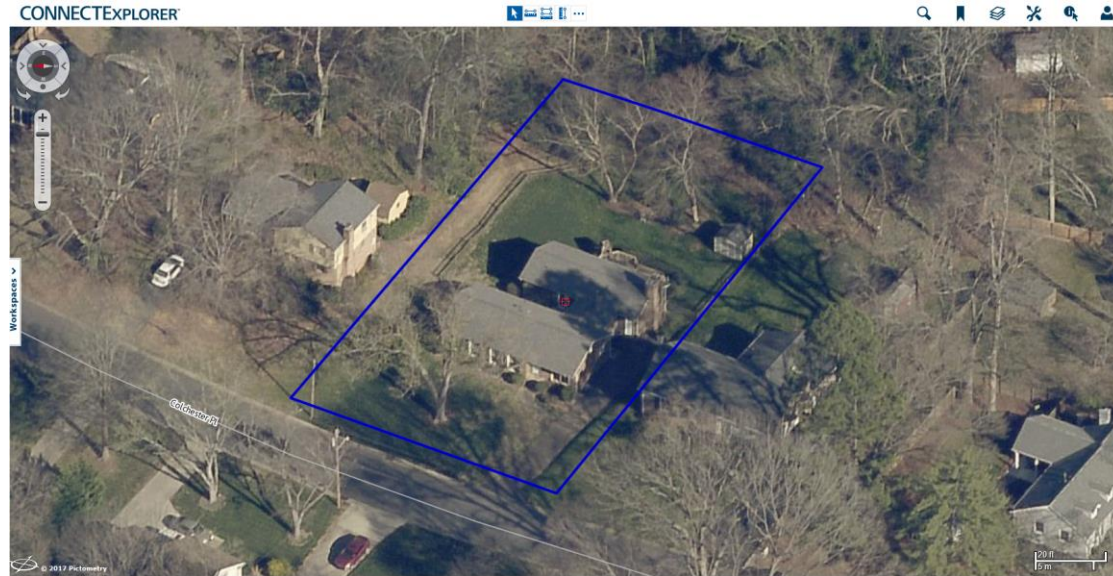
The screenshot displays the iLookabout GeoViewPort web application within a WebBrowser window. The interface is divided into several sections:

- Left Sidebar:** Contains the iLOOKABOUT GeoViewPort logo, navigation links (Privacy, Feedback, Settings, Help, Service), a search section for "Search Single Property" with fields for PID, Address, and a dropdown for "Current Dataset" (set to Mecklenburg 2017), and a "Roll Number" list with six entries (17512123, 05120421, 05120436, 03304401, 03304146, 03304463) each with a delete icon.
- Top Panel:** Labeled "iLOOKABOUT StreetScape", it shows a date of "February 02 2017" and a "Report a problem" link.
- Main View:** A large aerial photograph of a white, two-story house with a red door and an American flag. A "Vintage Photos" overlay shows a smaller image of the same house from a different angle.
- Right Panel:** Labeled "Pictometry Map", it shows a map view with a red pin, a date of "02/27/2017", and a "1 of 6" indicator.

At the bottom left of the screenshot is the official seal of the City of Mecklenburg, North Carolina.

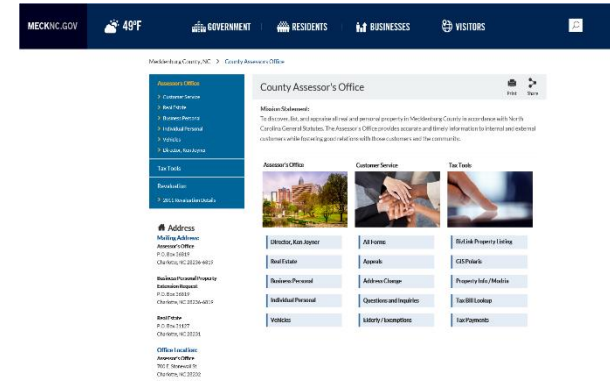


# Technology



## Applications in Modria

- Pictometry
- iLookabout



# Quality Control

- Hired QC Coordinator
  - Reviewing all aspects of Reval
  - Training staff
  - Documenting Procedures and Processes
  - New Appraisal Field Manual
- Data cleansing
  - Spatialest is a GIS based CAMA toolset that works with and enhances the functionality of any CAMA system. Also provides post analysis which identifies areas or properties at high risk of appeal
- Vincent Valuations
  - method of sales cleansing
- Statistical Analyst-Josh Myers Valuations





# Table of Resources

- 46 New positions have been added to the CAO since FY2013
- FY2013
  - Revaluation Reserve Funds approved[\$3,250,000]
  - Positions Hired: Transferred from LUESA to new CAO
    - Assessor's Office Business Manager
    - IT Program Manager
- FY2014
  - Revaluation Reserved Funds Allocated [\$1,000,000]
  - Street Level Photo Imagery
  - Positions Hired: 20 total
    - IT Business Analyst
    - 10 Appraisers (one reclassified to Assistant Assessor)
    - 5 Assessment Analyst
    - 2 Business Personal Property Auditors
    - 2 Personal Property Admin Support



# Table of Resources

- FY2015
  - Revaluation Reserved Funds allocated [\$1,000,000]
  - Positions Hired:
    - 2 Transferred positions from BSSA
    - IT Business Analyst: redirection from OTC
    - Senior Reporting Analyst: redirection from Manager's Office
    - Admin Support Staff
- FY2016
  - Revaluation Reserve Funds approved[\$750,000]
  - Technology
    - CAMA maintenance increase
    - Street View Pictometry funding for Phase 2



# Table of Resources

- FY2017
  - Approved Funding for following systems
    - Modria online dispute and resolution center
    - Farragut Appeals Module
  - Positions Hired
    - Revaluation Manager
    - 6 Senior Appraisers (Revaluation Team)
    - Approved Funding for 10 Temporary clerical support for data entry and 10 Temporary field lists for canvassing
- FY2018
  - Approved Funding for Farragut Appeals Module
  - Approved Funding for the following positions
    - 5 Assessment Analysts
    - 5 Real Property Appraisers
    - Appraisal Manager
    - Q&T Coordinator
    - 2 Property Admin Support II's



# Awards and Recognition

- CEAA awarded to the Mecklenburg CAO
  - CEAA is awarded to jurisdictions that have developed superior assessment practices in all aspects of their operations
  - Only 2<sup>nd</sup> County in the state to achieve award
  - Since 2004 only 38 jurisdictions have received this award
  - 1 of 3 jurisdictions to receive in 2017



# Awards and Recognition

## 2017 IAAO Designations

- Cecil Jackson-AAS
  - 2015 RES
- John Geier- RES
- Sandy Martin-PPS
- Eric Anderson-PPS



# In the News



1 San Jose, CA Household Income: \$710,040 Zillow Home Value Forecast: 8.9% Glassdoor Job Openings: 70,376	6 Austin, TX Household Income: \$71,000 Zillow Home Value Forecast: 3.3% Glassdoor Job Openings: 47,430
2 Raleigh, NC Household Income: \$71,685 Zillow Home Value Forecast: 3.7% Glassdoor Job Openings: 29,186	7 Denver, CO Household Income: \$71,826 Zillow Home Value Forecast: 3.0% Glassdoor Job Openings: 81,479
3 Seattle, WA Household Income: \$78,612 Zillow Home Value Forecast: 5.4% Glassdoor Job Openings: 102,212	8 Nashville, TN Household Income: \$60,030 Zillow Home Value Forecast: 3.8% Glassdoor Job Openings: 38,257
4 Charlotte, NC Household Income: \$59,979 Zillow Home Value Forecast: 4.0% Glassdoor Job Openings: 49,736	9 Portland, OR Household Income: \$68,676 Zillow Home Value Forecast: 3.7% Glassdoor Job Openings: 44,845
5 San Francisco, CA Household Income: \$96,677 Zillow Home Value Forecast: 3.8% Glassdoor Job Openings: 137,073	10 Dallas, TX Household Income: \$63,812 Zillow Home Value Forecast: 4.7% Glassdoor Job Openings: 142,084

## By all measures, a construction boom is shaping up for 2018

- The construction industry added 30,000 jobs last month, according to the Labor Department.
- That brings the sector's 2017 gains to 210,000 positions, a 35 percent increase over the previous year.
- Construction spending is also soaring, up to a record \$1.257 trillion in November, according to the Commerce Department.
- Optimism among construction contractors is also at a record high.

Diana Olick | @DianaOlick

Published 11:06 AM ET Fri, 5 Jan 2018 | Updated 8:18 AM ET Mon, 8 Jan 2018



SEP 26, 2017, 12:54 PM EDT RESIDENTIAL REAL ESTATE

**Price gains show no signs of stopping in Charlotte's home market**



NOV 28, 2017, 1:23 PM EST RESIDENTIAL REAL ESTATE

**Increases in local home prices continue to top 6%**

"In Charlotte, as is the case with Raleigh and seven of the other top markets, home values are expected to increase at a higher rate than the national forecast of 3.2%. Charlotte is expected to see a 4% increase in home values in 2018 compared to a 3.7% increase for Raleigh. Meanwhile, rents should climb 1.9% in Charlotte and 1.2% in Raleigh, says Zillow." By [Jenna Martin](#) - Associate Editor/Online, Charlotte Business Journal Jan 9, 2018



# Calendar of Events-BOCC

- 1/17-7/19 Community Engagement (100 expected speaking engagements)
- 1/18 Board of County Commissioners Retreat
- 1/18-12/18 Citizens Review Committee
- 8/18 BOCC Initial Presentation of Schedule of Values
- 9/18 Public Hearings for Schedule of Values
- 9/18 BOCC Adoption of Schedule of Values
- 10/18 CAO Value Finalization
- 12/18 Notices of Value Mailing
- 7/19 Tax Bill Mailing – FY20 Collections

